

# Creating an Inactive Client Alert

This alert indicates the active clients where there has not been an encounter or miscellaneous note for some period of time.

1. **Getting here:** Login, on the Navigation Pane (left menu) select **Agency** to activate the Agency List menu.
2. Select **Alerts Configuration**.
3. Select **Add New Alert**.

The screenshot shows the Idaho-WITS Training interface. On the left, the navigation pane has the 'Agency' menu expanded, with 'Agency List' selected. A red circle with the number '1' is placed over the 'Agency List' menu item. In the main content area, the 'Agency List' table is displayed. A red circle with the number '2' is placed over the 'Alerts Configuration' link in the table's header row.

Actions	Name	Display Name	Description
	A Managed Service Contractor	A Managed Servi	
	Auth Period Testing	Auth Period Tes	
	Bonneville County Community Crisis Center	Bonneville CCCC	
	Business Psychology Associates	BPA	
	D Williams Agency	D Williams Agen	
	Department of Health & Welfare	State DHW	
	DHW Child Welfare	Child Welfare	
	DHW Contractor	DHW Contractor	DHW TEST CONTRACTOR agency for SUD
	Idaho Department of Correction	IDOC	
	Idaho Dept of Juvenile Corrections	IDJC	
	Idaho Hope Project	Idaho Hope	
	Idaho Supreme Ct	ID Supreme Ct	
	IDHW, AMH	AMH Training	
	IDHW, CMH	CMH Training	
	IDHW, DBH, Region 1	DBH, Region 1	
	IDHW, DBH, Region 2	DBH, Region 2	

The screenshot shows the Idaho-WITS Training interface. On the left, the navigation pane has the 'Alerts Configuration' menu selected. A red circle with the number '3' is placed over the 'Add New Alert' link in the table's header row.

Alert Configuration Search

Alert Category: [v] Alert Type: [v]  
Assigned to Staff Type: [v] Alert Name: [v]

Clear Go

Alert Configuration List

Actions	Alert Type	Alert Name	Levels of care	Include case w/o LOC	Active	Assigned to Staff Type	Facility Excluded

4. Enter **Alert Name**.
  5. Select **Inactive Client** as the **Alert type**
  6. Enter the message in **What message should appear to users?**
  7. Complete these fields.
    - **When is the next activity due (days after the trigger point)?**
    - **How many days prior to the due date should this alert show up?**
    - **Which staff should receive the message?**
    - **Should message turn red when overdue?**
  8. Select the appropriate **Levels of Care** this alert applies to. Use the greater than sign (>) to move them to the box on the right.
- Note: If you do not select the level of care the alert will not work properly.***
9. Select any **Facilities** this alert *will not* apply to. Use the greater than sign (>) to move them to the box on the right.
  10. Enter the **Number of Days** you want this alert to show.
  11. Enter the **Effective Date**.
  12. Select **Finish**.

The screenshot shows the 'Agency Alert Configuration Profile' form. The left sidebar contains a navigation menu with options like Agency List, GPRA Discharge Due, GPRA Followup Due, Facility List, Staff List, Tx Team Groups, System Usage, Drug Screening, Billing, Contract Management, Alerts Configuration, Vendor Management, MU Calculation, Group List, Clinical Dashboard, Authorization Dashboard, Client List, System Administration, My Settings, Reports, and Support Ticket.

The main form area is titled 'Agency Alert Configuration Profile' and contains the following fields and sections:

- Configuration Type:** Agency (Callout 4)
- Alert Name:** Inactive Client (Callout 4)
- Alert Type:** Inactive Client (Callout 5)
- Trigger Point:** Last Encounter Date or Miscellaneous (Callout 5)
- Alert Category:** Client (Callout 5)
- Alert Description:** Indicates the active clients where there has not been an encounter or miscellaneous note for some period of time.
- What message should appear to users?:** Inactive Client - Discharge clients no longer receiving services (Callout 6)
- When is the next activity due (days after the trigger point)?** 30 (Callout 7)
- How many days prior to the due date should this alert show up?** 20 (Callout 7)
- Which staff should receive the message?** Case Assigned To (Callout 7)
- Should message turn red when overdue?** Yes (Callout 7)
- Include cases where no level of care indicated?** Yes (Callout 7)
- Levels of Care:** SMHA-Outpatient: High Acuity, SMHA-Outpatient: Low Acuity, SMHA-Outpatient: Med-Only Clinic, SMHA-Outpatient: Moderate Acuity (Callout 8)
- Modify for these Levels of Care:** Other Psychiatric Inpatient, Residential Treatment (Children), I.O Outpatient, I.I.1 Intensive Outpatient (Callout 8)
- Which facilities follow these rules:** Effective for these Facilities, Treatment Location 1, Treatment Location 2 (Callout 11)
- Excluded Facilities:** Only for facilities you want excluded from this alert (Callout 9)
- Alert should stop being displayed this many days after it is generated:** 24 (Callout 10)
- Effective Date:** 2/23/2015 (Callout 11)
- Expiration Date:** (Callout 10)
- Buttons:** Cancel, Save, Finish (Callout 12)